


FIND EXPENSE REPORT

EMPLOYEE AS SELF – FROM EXPENSE APPLICATION

From the Expenses application:

1. Click the **Expense Reports** button under **View**.
 - a. You have the option of filtering expense reports by status or date.

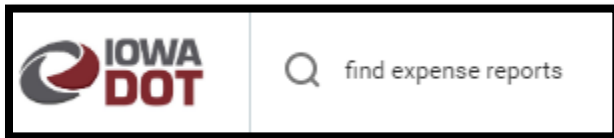
- b. After you choose your method of filtering then click **Ok**.
- c. You will see the expense reports that match your filtering methods.
- d. If you want to view the expense report, you can click the magnifying glass  in the first column.
- e. If you need to make a correction to an expense report you can scroll to the last column on the right and click **Change Expenses...**. This will take you to the **Create Expense Report** page where you can change as needed.

Expense Report	Expense Report Number	Expense Report Date	Expense Report Status	Memo	Total Amount	Re
	EXP-10002609	03/14/2019	In Progress	Conference Chicago	388.00	
	EXP-10002592	03/13/2019	Draft		0.00	
	EXP-10002565	03/12/2019	Canceled		0.00	
	EXP-10002566	03/12/2019	Draft		88.00	
	EXP-10002531	03/11/2019	In Progress		88.00	
	EXP-10002536	03/11/2019	In Progress			
	EXP-10002537	03/11/2019	In Progress			
	EXP-10002538	03/11/2019	In Progress		5.00	

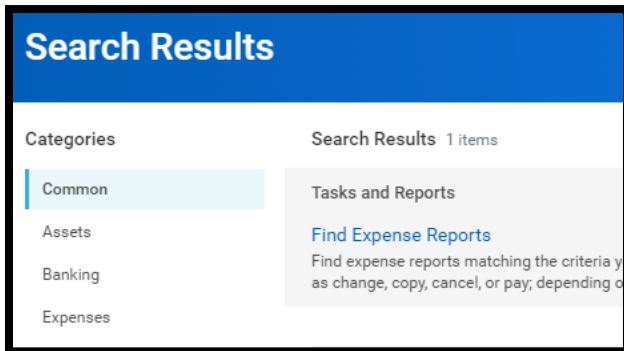
SUPERVISOR SEARCHING FOR EMPLOYEE – FROM SEARCH BAR

From the Search bar:

1. Type **Find Expense Reports** in the search bar.



2. Click on **Find Expense Reports**



Find Expense Reports

A screenshot of the 'Find Expense Reports' form. The form has a blue header with the text 'Find Expense Reports'. Below the header, there are several fields for filtering the search results. The 'Company' field is set to '645 Iowa Department of Transportation'. The 'Pay To' field is set to 'Employee: Christina Jewell (03872)'. The 'Payee Type' field is set to 'Employee: Christina Jewell (03872)'. The 'Report Date On or After' field is empty. The 'Report Date On or Before' field is empty. The 'Supplier for Contingent Worker' field is empty. The 'Corporate Credit Card Accounts for Expense Report' field is empty. The 'Document Number' field is empty. The 'Expense Report Status' field is empty. The 'Expense Report Worker Payment Status' field is empty. The 'Expense Report Credit Card Payment Status' field is empty. The 'Expense Report Created by Worker' field is empty. The 'Created On or After' field is empty. The 'Created On or Before' field is empty. The 'Approved On or After' field is empty. The 'Approved On or Before' field is empty. At the bottom of the form, there are two buttons: 'OK' and 'Cancel'. Annotations with red boxes and arrows point to the 'Company' field, the 'Pay To' field, the 'Payee Type' field, and the 'OK' button. The annotations contain the following text: 'Type in 645', '1. In the Pay To box type in the name of the Employee and hit enter.', '2. Make sure you select Employee: Name and not Pre-Hire', and 'Click OK when finished to find expense reports'.

3. After clicking **Ok** you will be able to view all expense reports and see whether they are in draft, in progress, approved, or canceled.

Find Expense Reports Actions

Company 645 Iowa Department of Transportation Pay To Christina Jewell (03872)

4 items

In order to edit click the orange related actions button that looks like a twinkie.

Expense Report	Expense Report Number	Company	Expense Report Status	Pay To	Payee Type
Expense Report: EXP-10004119 ...	EXP-10004119	645 Iowa Department of Transportation	Draft	Employee: Christina Jewell (03872)	Employee
Expense Report: EXP-10004116 Canceled	EXP-10004116	645 Iowa Department of Transportation	Canceled	Employee: Christina Jewell (03872)	Employee
Expense Report: EXP-10004115 Canceled	EXP-10004115	645 Iowa Department of Transportation	Canceled	Employee: Christina Jewell (03872)	Employee
Expense Report: EXP-10003434 Canceled	EXP-10003434	645 Iowa Department of Transportation	Canceled	Employee: Christina Jewell (03872)	Employee

4. If you click the related actions button you will be able to see various options depending on the status of the expense report.

4 items

Expense Report	Expense Report Number	Company	Expense Report Status
Expense Report: EXP-10004119 ...	EXP-10004119	645 Iowa Department of Transportation	Draft
Expense Report: EXP-10004116 Canceled	EXP-10004116	645 Iowa Department of Transportation	Canceled
Expense Report: EXP-10004115 Canceled	EXP-10004115	645 Iowa Department of Transportation	Canceled
Expense Report: EXP-10003434 Canceled	EXP-10003434	645 Iowa Department of Transportation	Canceled

Actions

- Expense Report >
- Audits >
- Business Process >
- Data Error >
- Favorite >
- Integration IDs >

Expense Report EXP-10004119

- Edit
- Cancel
- Copy
- Enable Multicurrency
- Print
- Submit

Company 645 Iowa Department of Transportation

5. If you want to see where in the process the expense report is you can click on the blue link for the expense report.

Find Expense Reports Actions

Company 645 Iowa Department of Transportation Pay To

4 items

Click here to view the report and the business process

Expense Report	Expense Report Number	Company
Expense Report: EXP-10004119 ...	EXP-10004119	645 Iowa Department of Transportation
Expense Report: EXP-10004116 Canceled	EXP-10004116	645 Iowa Department of Transportation
Expense Report: EXP-10004115 Canceled	EXP-10004115	645 Iowa Department of Transportation
Expense Report: EXP-10003434 Canceled	EXP-10003434	645 Iowa Department of Transportation

View Expense Report

EXP-10004119 [Actions](#)

Pay To
Employee: Christina Jewell (03872)

Status
In Progress

Personal
0.00 USD

Reimbursement
125.36 USD

Header

Attachments

Business Process

Expense Lines

Business Process 10 items

Process	Step	Status	Completed On	Due Date	Person
Expense Report Event	Expense Report Event	Step Completed	07/08/2019 02:53:47 PM	07/15/2019	Jon Makovec (54439)
Expense Report Event	Approval by Manager	Automatic Approval	07/08/2019 02:53:47 PM	07/10/2019	Jon Makovec (54439) (Manager)
Expense Report Event	Review Expense Report	Awaiting Action		07/10/2019	Connie Haselhoff (34995) (Expense Partner)
					Donna Banker (07995) (Expense Partner)
					Kathy LaRue (51570) (Expense Partner)
					Kelly Bunting (85570) (Expense Partner)

This will show you who is next in line for approvals.